

(19) World Intellectual Property  
Organization  
International Bureau



(43) International Publication Date  
1 April 2004 (01.04.2004)

PCT

(10) International Publication Number  
**WO 2004/027392 A1**

(51) International Patent Classification<sup>7</sup>: **G01N 3/08**

[US/US]: 19115 Prospect Ridge Lane, Houston, TX 77094 (US). **RING, Lev** [US/US]: 14126 Heatherhill Place, Houston, TX 77077 (US).

(21) International Application Number:  
PCT/US2003/025667

(22) International Filing Date: 18 August 2003 (18.08.2003)

(74) Agents: **MATTINGLY, Todd et al.**; Haynes and Boone, LLP, Suite 4300, 1000 Louisiana Street, Houston, TX 77002-5012 (US).

(25) Filing Language: English

(26) Publication Language: English

(30) Priority Data:  
60/412,653 20 September 2002 (20.09.2002) US

(81) Designated States (*national*): AE, AG, AL, AM, AT, AU, AZ, BA, BB, BG, BR, BY, BZ, CA, CH, CN, CO, CR, CU, CZ, DE, DK, DM, DZ, EC, EE, ES, FI, GB, GD, GE, GH, GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MA, MD, MG, MK, MN, MW, MX, MZ, NO, NZ, OM, PH, PL, PT, RO, RU, SC, SD, SE, SG, SK, SL, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ, VC, VN, YU, ZA, ZM, ZW.

(71) Applicant (*for all designated States except US*): **ENVEN-  
TURE GLOBAL TECHNOLOGY** [US/US]; 16200 A  
Park Row, Houston, TX 77084 (US).

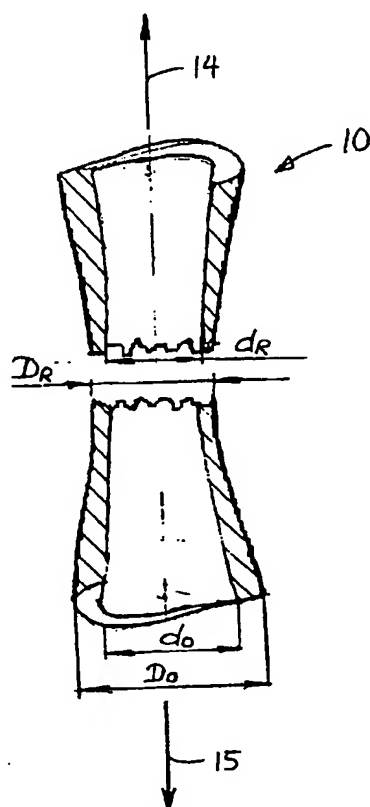
(84) Designated States (*regional*): ARIPO patent (GH, GM, KE, LS, MW, MZ, SD, SL, SZ, TZ, UG, ZM, ZW), Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, BG, CH, CY, CZ, DE, DK, EE,

(72) Inventors; and

(75) Inventors/Applicants (*for US only*): **SHUSTER, Mark**

[Continued on next page]

(54) Title: PIPE FORMABILITY EVALUATION FOR EXPANDABLE TUBULARS



(57) Abstract: A method of testing a tubular member (10) and selecting tubular members for suitability for expansion by subjecting a representative sample the tubular member to axial loading (14, 15), stretching at least a portion of the tubular member through elastic deformation, plastic yield and to ultimate yield, and based upon changes in length and area calculating an expandability coefficient indicative of expandability of the tubular members (10) and selecting tubular members (10) with relatively high coefficients indicative of good expandability.

WO 2004/027392 A1

- before the expiration of the time limit for amending the claims and to be republished in the event of receipt of amendments

- of inventorship (Rule 4.17(iv)) for US only

— with international search report

*For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.*

**PIPE FORMABILITY EVALUATION FOR  
EXPANDABLE TUBULARS**

**Cross Reference To Related Applications**

[1] The present application claims the benefit of the filing dates of (1) U.S. provisional patent application serial no. 60/412,653, attorney docket no 25791.118, filed on 9/20/2002, the disclosure of which is incorporated herein by reference.

[2] The present application is related to the following: (1) U.S. patent application serial no. 09/454,139, attorney docket no. 25791.03.02, filed on 12/3/1999, (2) U.S. patent application serial no. 09/510,913, attorney docket no. 25791.7.02, filed on 2/23/2000, (3) U.S. patent application serial no. 09/502,350, attorney docket no. 25791.8.02, filed on 2/10/2000, (4) U.S. patent no. 6,328,113, (5) U.S. patent application serial no. 09/523,460, attorney docket no. 25791.11.02, filed on 3/10/2000, (6) U.S. patent application serial no. 09/512,895, attorney docket no. 25791.12.02, filed on 2/24/2000, (7) U.S. patent application serial no. 09/511,941, attorney docket no. 25791.16.02, filed on 2/24/2000, (8) U.S. patent application serial no. 09/588,946, attorney docket no. 25791.17.02, filed on 6/7/2000, (9) U.S. patent application serial no. 09/559,122, attorney docket no. 25791.23.02, filed on 4/26/2000, (10) PCT patent application serial no. PCT/US00/18635, attorney docket no. 25791.25.02, filed on 7/9/2000, (11) U.S. provisional patent application serial no. 60/162,671, attorney docket no. 25791.27, filed on 11/1/1999, (12) U.S. provisional patent application serial no. 60/154,047, attorney docket no. 25791.29, filed on 9/16/1999, (13) U.S. provisional patent application serial no. 60/159,082, attorney docket no. 25791.34, filed on 10/12/1999, (14) U.S. provisional patent application serial no. 60/159,039, attorney docket no. 25791.36, filed on 10/12/1999, (15) U.S. provisional patent application serial no. 60/159,033, attorney docket no. 25791.37, filed on 10/12/1999, (16) U.S. provisional patent application serial no. 60/212,359, attorney docket no. 25791.38, filed on 6/19/2000, (17) U.S. provisional patent application serial no. 60/165,228, attorney docket no. 25791.39, filed on 11/12/1999, (18) U.S. provisional patent application serial no. 60/221,443, attorney docket no. 25791.45, filed on 7/28/2000, (19) U.S. provisional patent application serial no. 60/221,645, attorney docket no. 25791.46, filed on 7/28/2000, (20) U.S. provisional patent application serial no. 60/233,638, attorney docket no. 25791.47, filed on 9/18/2000, (21) U.S. provisional patent application serial no. 60/237,334, attorney docket no. 25791.48, filed on 10/2/2000, (22) U.S. provisional patent application serial no. 60/270,007, attorney docket no. 25791.50, filed on 2/20/2001, (23) U.S. provisional patent application serial no. 60/262,434, attorney docket no. 25791.51, filed on 1/17/2001, (24) U.S. provisional patent application serial no. 60/259,486, attorney docket no. 25791.52, filed on 1/3/2001, (25) U.S. provisional patent application serial no. 60/303,740, attorney docket no. 25791.61, filed on 7/6/2001, (26) U.S. provisional patent application serial no. 60/313,453, attorney docket no. 25791.59, filed on 8/20/2001, (27) U.S. provisional patent application serial no. 60/317,985, attorney docket no. 25791.67, filed on 9/6/2001, (28) U.S. provisional patent application serial no. 60/3318,386, attorney docket no. 25791.67.02, filed on 9/10/2001, (29) U.S. utility

patent application serial no. 09/969,922, attorney docket no. 25791.69, filed on 10/3/2001, (30) U.S. utility patent application serial no. 10/016,467, attorney docket no. 25791.70, filed on 12/10/2001, (31) U.S. provisional patent application serial no. 60/343,674, attorney docket no. 25791.68, filed on 12/27/2001, (32) U.S. provisional patent application serial no. 60/346,309, attorney docket no. 25791.92, filed on 1/7/2002, (33) U.S. provisional patent application serial no. 60/372,048, attorney docket no. 25791.93, filed on 4/12/2002, (34) U.S. provisional patent application serial no. 60/380,147, attorney docket no. 25791.104, filed on 5/6/2002, (35) U.S. provisional patent application serial no. 60/387,486, attorney docket no. 25791.107, filed on 6/10/2002, (36) U.S. provisional patent application serial no. 60/387,961, attorney docket no. 25791.108, filed on 6/12/2002, (37) U.S. provisional patent application serial no. 60/394,703, attorney docket no. 25791.90, filed on 6/26/2002, (38) U.S. provisional patent application serial no. 60/397,284, attorney docket no. 25791.106, filed on 7/19/2002, (39) U.S. provisional patent application serial no. 60/398,061, attorney docket no. 25791.110, filed on 7/24/2002, (40) U.S. provisional patent application serial no. 60/405,610, attorney docket no. 25791.119, filed on 8/23/2002, (41) U.S. provisional patent application serial no. 60/405,394, attorney docket no. 25791.120, filed on 8/23/2002, (42) U.S. provisional patent application serial no. 60/412,542, attorney docket no. 25791.102, filed on 9/20/2002, (43) U.S. provisional patent application serial no. 60/412,487, attorney docket no. 25791.112, filed on 9/20/2002, (44) U.S. provisional patent application serial no. 60/412,488, attorney docket no. 25791.114, filed on 9/20/2002, (45) U.S. provisional patent application serial no. 60/412,177, attorney docket no. 25791.117, filed on 9/20/2002, (46) U.S. provisional patent application serial no. 60/412,653, attorney docket no. 25791.118, filed on 9/20/2002, (47) U.S. provisional patent application serial no. 60/412,544, attorney docket no. 25791.121, filed on 9/20/2002, (48) U.S. provisional patent application serial no. 60/412,196, attorney docket no. 25791.127, filed on 9/20/2002, (49) U.S. provisional patent application serial no. 60/412,187, attorney docket no. 25791.128, filed on 9/20/2002, and (50) U.S. provisional patent application serial no. 60/412,371, attorney docket no. 25791.129, filed on 9/20/2002, the disclosures of which are incorporated herein by reference.

#### **Background of the Invention**

[ 3 ] The present invention relates generally to tubular steel well casing and more particularly to an expansion mandrel which reduces stress during expansion of the casing.

[ 4 ] Solid tubular casing of substantial length is used as a borehole liner in downhole drilling. The casing is comprised of end-to-end interconnected segments of steel tubing to protect against possible collapse of the borehole and to optimize well flow. The tubing often reaches substantial depths and endures substantial pressures.

[ 5 ] It is present practice to expand the steel tubing downhole by using a mandrel. This is a cold-working process which presents substantial mechanical challenges. This technology is known as solid expandable tubular (SET) technology. This cold-working process deforms the steel without any additional heat beyond what is present in the downhole environment.

[ 6] It is present practice to expand the steel tubing downhole by using a mandrel. This is a cold-working process which presents substantial mechanical challenges. This technology is known as solid expandable tubular (SET) technology. This cold-working process deforms the steel without any additional heat beyond what is present in the downhole environment.

[ 7] An expansion cone, or mandrel, is used to permanently mechanically deform the pipe. The cone is moved through the tubing by a differential hydraulic pressure across the cone itself, and/or by a direct mechanical pull or push force. The differential pressure is pumped through an inner-string connected to the cone, and the mechanical force is applied by either raising or lowering the inner string.

[ 8] Progress of the cone through the tubing deforms the steel beyond its elastic limit into the plastic region, while keeping stresses below ultimate yield. Expansions greater than 20%, based on pipe ID, have been accomplished. However, most applications using 4 1/4 - 13 3/8 inch tubing have required expansions less than 20%. The ID of the pipe expands to the same ID of the expansion mandrel, which is a function of expansion mandrel OD. Contact between cylindrical mandrel and pipe ID during expansion leads to significant forces due to friction. It would be beneficial to provide method for testing tubular members for suitability for the expansion process. It would also be beneficial to provide a method for selecting tubing or tubular members well suited for expansion.

#### Summary Of The Invention

[ 9] According to one aspect of the present invention, a method of testing a tubular member for suitability for expansion is provided using an expandability coefficient determined pursuant to a stress-strain test of a tubular member using axial loading.

[ 10] According to another aspect of the present invention, a tubular member is selected for suitability for expansion on a basis comprising use of an expandability coefficient determined pursuant to a stress-strain test of a tubular member using axial loading.

[ 11] According to another aspect of the present invention, a method of testing a tubular member for suitability for expansion is provided using an expandability coefficient determined pursuant to a stress-strain test using axial loading comprising calculation of plastic strain ratio for obtaining the expansion coefficient pursuant to test results and using the formula:

$$f = \frac{\ln \frac{b_o}{b_k}}{\ln \frac{L_k b_k}{l_o b_o}} \quad \text{Equation 1}$$

where,

$f$  - expandability coefficient

$b_o$  &  $b_k$  - initial and final tube area (inch<sup>2</sup>)

$L_o$  &  $L_k$  - initial and final tube length (inch)

$b = (D^2 - d^2)/4$  - cross section tube area.

[ 12] According to another aspect of the present invention, a tubular member is selected for suitability for expansion on a basis comprising use of an expandability coefficient determined pursuant to a stress-strain test using axial loading comprising calculation of plastic strain ratio for obtaining the expansion coefficient pursuant to test results and using the formula:

$$f = \frac{\ln \frac{b_o}{b_k}}{\ln \frac{L_k b_k}{L_o b_o}} \quad \text{Equation 1}$$

where,

$f$  - expandability coefficient

$b_o$  &  $b_k$  - initial and final tube area (inch<sup>2</sup>)

$L_o$  &  $L_k$  - initial and final tube length (inch)

$b = (D^2 - d^2)/4$  - cross section tube area.

[ 13] According to another aspect of the present invention, a tubular member is selected for suitability for expansion on a basis comprising use of an expandability coefficient determined pursuant to a stress-strain test using axial loading and one or more physical properties of the tubular member selected from stress-strain properties in one or more directional orientations of the material, Charpy V-notch impact value in one or more directional orientations of the material, stress rupture burst strength, stress rupture collapse strength, strain-hardening exponent( $n$ -value), hardness and yield strength.

#### Brief Description of the Drawings

[ 14] Fig. 1 depicts in a schematic fragmentary cross-sectional view along a plane along and through the central axis of a tubular member that is tested to failure with axial opposed forces.

[ 15] Fig. 2 is a stress-strain curve representing values for stress and strain that may be plotted for solid specimen sample.

[ 16] Fig. 3. is a schematically depiction of a stress strain curve representing values from a test on a tubular member according to an illustrative example of one aspect of the invention.

#### Detailed Description of the Illustrative Embodiments

[ 17] One of the problems of the pipe material selection for expandable tubular application is an apparent contradiction or inconsistency between strength and elongation. To increase burst and collapse strength, material with higher yield strength is used. The higher yield strength generally corresponds to a decrease in the fracture toughness and correspondingly limits the extent of achievable expansion.

[ 18] It is desirable to select the steel material for the tubing by balancing steel strength with amount absorbed energy measure by Charpy testing. Generally these tests are done on samples cut from tubular members. It has been found to be beneficial to cut directional samples both longitudinally oriented

(aligned with the axis) and circumferentially oriented (generally perpendicular to the axis). This method of selecting samples is beneficial when both directional orientations are used yet does not completely evaluate possible and characteristic anisotropy throughout a tubular member. Moreover, for small diameter tubing samples representative of the circumferential direction may be difficult and sometimes impossible to obtain because of the significant curvature of the tubing.

[ 19] To further facilitate evaluation of a tubular member for suitability for expansion it has been found beneficial according to one aspect of the invention to consider the plastic strain ratio. One such ratio is called a Lankford value (or r-value) which is the ratio of the strains occurring in the width and thickness directions measured in a single tension test. The plastic strain ratio (r or Lankford - value) with a value of greater than 1.0 is found to be more resistant to thinning and better suited to tubular expansion. Such a Lankford value is found to be a measure of plastic anisotropy. The Lankford value (r) may be calculate by the Equation 2 below:

$$r = \frac{\ln \frac{b_o}{b_k}}{\ln \frac{L_k b_k}{L_o b_o}} \quad \text{Equation 2}$$

where,

r - normal anisotropy coefficient

b<sub>o</sub> & b<sub>k</sub> - initial and final width

L<sub>o</sub> & L<sub>k</sub> - initial and final length

[ 20] However, it is time consuming and labor intensive for this parameter to be measured using samples cut from real parts such as from the tubular members. The tubular members will have anisotropic characteristics due to crystallographic or "grain " orientation and mechanically induced differences such as impurities, inclusions, and voids, requiring multiple samples for reliably complete information. Moreover, with individual samples, only local characteristics are determined and the complete anisotropy of the tubular member may not be determinable. Further some of the tubular members have small diameters so that cutting samples oriented in a circumferential direction is not always possible. Information regarding the characteristics in the circumferential direction has been found to be important because the plastic deformation during expansion of the tubular members occurs to a very large extent in the circumferential direction,

[ 21] One aspect of the present invention comprises the development of a solution for anisotropy evaluation, including a kind of plastic strain ratio similar to the Lankford parameter that is measured using real tubular members subjected to axial loading.

[ 22] Fig. 1 depicts in a schematic fragmentary cross-sectional view along a plane along and through the axis 12 of a tubular member 10 that is tested with axial opposed forces 14 and 15. The tubular member 10

is axially stretched beyond the elastic limit, through yielding and to ultimate yield or fracture. Measurements of the force and the OD and ID during the process produce test data that can be used in the formula below to produce an expandability coefficient "*f*" as set forth in Equation 1 above. Alternatively a coefficient called a formability anisotropy coefficient *F(r)* that is function of the normal anisotropy Lankford coefficient *r* may be determined as in Equation 3 below:

$$F(r) = \frac{\ln \frac{b_o}{b_k}}{\ln \frac{L_k b_k}{L_o b_o}} \quad \text{Equation 3}$$

*F(r)* - formability anisotropy coefficient

*b<sub>o</sub>* & *b<sub>k</sub>* - initial and final tube area (inch<sup>2</sup>)

*L<sub>o</sub>* & *L<sub>k</sub>* - initial and final tube length (inch)

*b* = (*D*<sup>2</sup> - *d*<sup>2</sup>)/4 - cross section tube area.

[ 23] In either circumstance *f* or *F(r)* the use of this testing method for an entire tubular member provides useful information including anisotropic characteristics or anisotropy of the tubular member for selecting or producing beneficial tubular members for down hole expansion, similar to the use of the Lankford value for a sheet material.

[ 24] Just as values for stress and strain may be plotted for solid specimen samples, as schematically depicted in Fig 2, the values for conducting a test on the tubular member may also be plotted, as depicted in Fig 3. On this basis the expansion coefficient *f* (or the formability coefficient *F(r)*) may be determined. It will be the best to measure distribution (Tensile-elongation) in longitudinal and circumferential directions simultaneously.

[ 25] The foregoing expandability coefficient (or formability coefficient) is found to be useful in predicting good expansion results and may be further useful when used in combination with one or more other properties of a tubular member selected from stress-strain properties in one or more directional orientations of the material, strength & elongation, Charpy V-notch impact value in one or more directional orientations of the material, stress burst rupture, stress collapse rupture, yield strength, ductility, toughness, and strain-hardening exponent (*n* - value), and hardness.

[ 26] Although illustrative embodiments of the invention have been shown and described, a wide range of modification, changes and substitution is contemplated in the foregoing disclosure. In some instances, some features of the present invention may be employed without a corresponding use of the other features. Accordingly, it is appropriate that the appended claims be construed broadly and in a manner consistent with the scope of the invention.



## Claims

What is claimed is:

1. A method of testing a tubular member for suitability for expansion is provided comprising the steps of subjecting at least a portion of the tubular member to axial loading, stretching at least a portion of the tubular member through the elastic deformation, plastic yield and to ultimate yield, and calculating an expandability coefficient  $f$ .
2. A method of testing a tubular member for suitability for expansion as in claim 1 wherein the step of subjecting the at least a portion of the tubular member to axial loading comprises subjecting the entire tubular member to axial loading.
3. A method of testing tubular members for suitability for expansion wherein the step of calculating an expandability coefficient comprises calculating the expandability coefficient using the following formula (Equation 1):

$$f = \frac{\ln \frac{b_o}{b_k}}{\ln \frac{L_k b_k}{L_o b_o}} \quad \text{Equation 1}$$

where,

$f$  - expandability coefficient

$b_o$  &  $b_k$  - initial and final tube area (inch<sup>2</sup>)

$L_o$  &  $L_k$  - initial and final tube length (inch)

$b = (D^2 - d^2)/4$  - cross section tube area.

4. A method of selecting tubular members for suitability for expansion is provided comprising the steps of subjecting at least a portion of a representative sample of tubular members to axial loading, stretching at least a portion of the tubular member through the elastic deformation, plastic yield and to ultimate yield, and calculating an expandability coefficient  $f$ , and choosing such tubular members for which the sample provided a desirable coefficient of expandability above a value of 1.
5. A method of selecting tubular members for suitability for expansion as in claim 1 wherein the step of subjecting the at least a portion of the tubular member to axial loading comprises subjecting at least one entire tubular member to axial loading.
6. A method of selecting tubular members for suitability for expansion wherein the step of calculating an expandability coefficient comprises calculating the expandability coefficient using the following formula (Equation 1):

$$f = \frac{\ln \frac{b_o}{b_k}}{\ln \frac{L_k b_k}{l_o b_o}}$$

Equation 1

where,

$f$  - expandability coefficient

$b_o$  &  $b_k$  - initial and final tube area (inch<sup>2</sup>)

$L_o$  &  $L_k$  - initial and final tube length (inch)

$b = (D^2 - d^2)/4$  - cross section tube area.

7. According to another aspect of the present invention, a tubular member is selected for suitability for expansion on a basis comprising use of an expandability coefficient determined pursuant to a stress-strain test using axial loading in combination with one or more physical properties of the tubular member selected from a group of properties comprising stress-strain properties in one or more directional orientations of the material, Charpy V-notch impact value in one or more directional orientations of the material, stress rupture burst strength, stress rupture collapse strength, yield strength, strain-hardening exponent ( $n$ -value), and hardness.

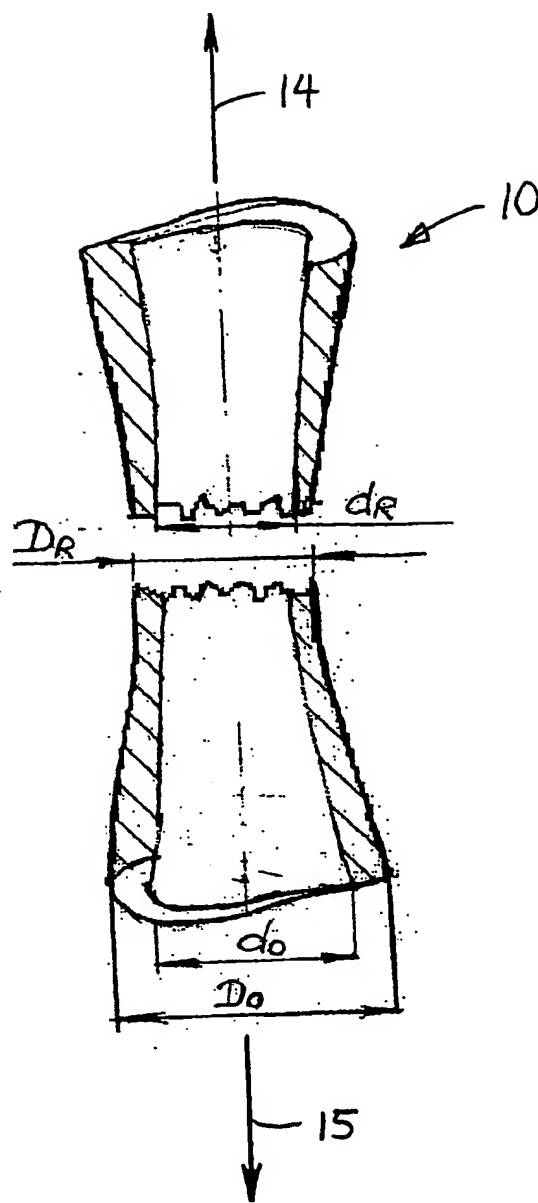


FIG. 1

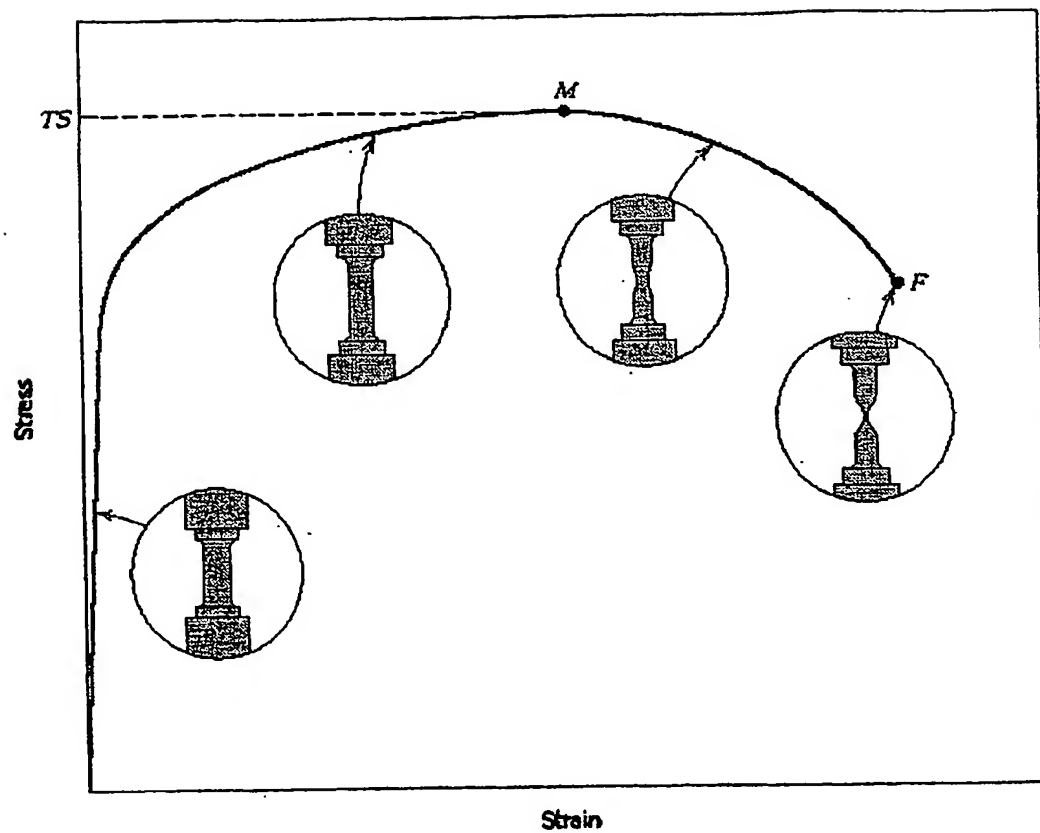


FIG. 2

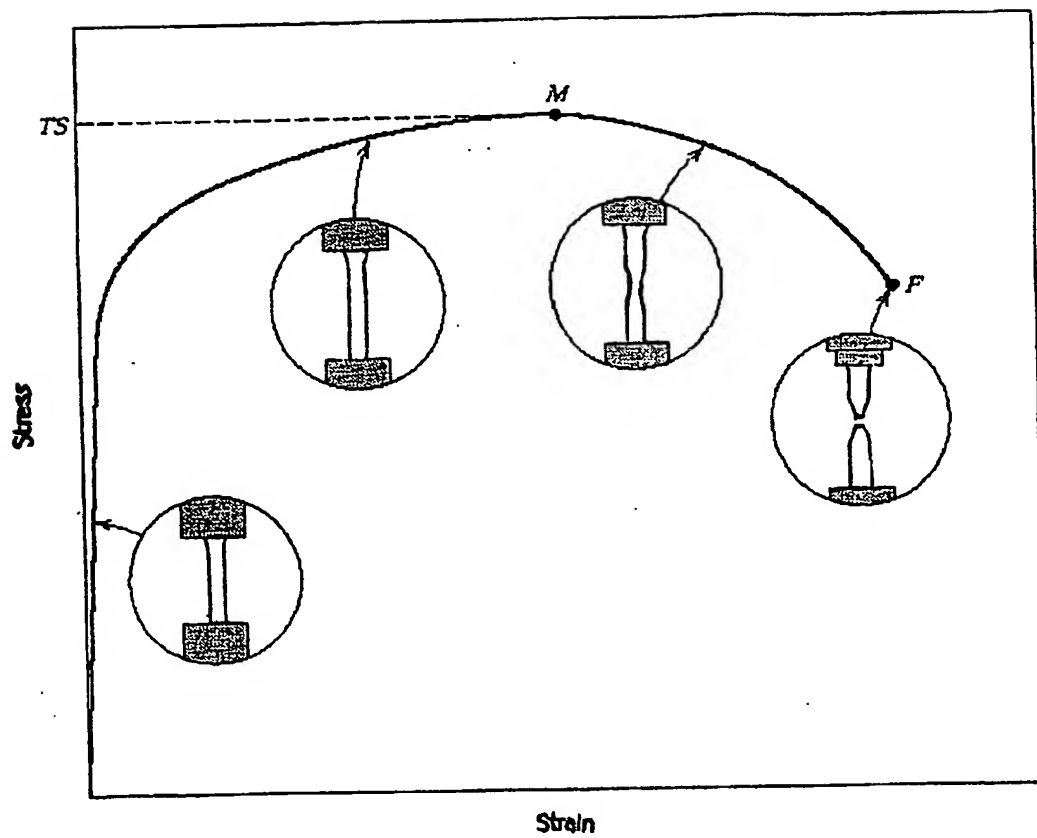


FIG. 3

## INTERNATIONAL SEARCH REPORT

International application No.

PCT/US03/25667

**A. CLASSIFICATION OF SUBJECT MATTER**IPC(7) : G01N 3/08,  
US CL : 73/821, 826, 818

According to International Patent Classification (IPC) or to both national classification and IPC

**B. FIELDS SEARCHED**Minimum documentation searched (classification system followed by classification symbols)  
U.S. : 73/821, 826, 818Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched  
East text searchElectronic data base consulted during the international search (name of data base and, where practicable, search terms used)  
USPAT, US-PGPub, EPO, JPO, Derwent, IBM\_TDP**C. DOCUMENTS CONSIDERED TO BE RELEVANT**

Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	US 5,134,891 A (CANEVET et al.) 4 August 1992 (4.08.1992), Col. 1, lines 15-26, Col. 2, lines 5-21, Figure 1.	1-2,4-5,7
—		
Y		3,6
B	US 6,672,759 B2 (FEGER) 6 January 2004 (6.01.2004), Abstract, Col. 9, lines 25-41.	1-7

☐ Further documents are listed in the continuation of Box C.

See patent family annex.

## \* Special categories of cited documents:

"A" document defining the general state of the art which is not considered to be of particular relevance	"T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention
"E" earlier application or patent published on or after the international filing date	"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone
"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)	"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art
"O" document referring to an oral disclosure, use, exhibition or other means	"&" document member of the same patent family
"P" document published prior to the international filing date but later than the priority date claimed	

Date of the actual completion of the international search

09 January 2004 (09.01.2004)

Date of mailing of the international search report

26 FEB 2004

Name and mailing address of the ISA/US  
Mail Stop PCT, Attn: ISA/US  
Commissioner for Patents  
P.O. Box 1450  
Alexandria, Virginia 22313-1450  
Facsimile No. (703) 305-3230

Authorized officer

Edward Lefkowitz

Telephone No. (703)308-0956